

Warehouse Robotics & AMR

The 2026 Buyer’s Guide & Vendor Landscape

A practitioner’s guide to evaluating, costing, and selecting warehouse robotics and autonomous mobile robots: what these systems do, how they differ across goods-to-person, collaborative, and storage approaches, how the market and vendors stack up in 2026, what they cost, and how to separate the hype from the deployment reality.

Prepared by Supply Chain Research · 2026 · Independent, vendor-neutral research

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1. Executive summary

Warehouse robotics and autonomous mobile robots, or AMRs, automate the movement, picking, and storage of goods inside distribution centers. They span several distinct approaches: goods-to-person systems that bring shelves or totes to a stationary picker, collaborative robots that escort human pickers through optimized paths, autonomous vehicles that tow and transport, mobile sorters, and cube and shuttle storage-and-retrieval systems that compress inventory into dense automated grids. Above the hardware sits fleet-orchestration software that coordinates the robots and connects them to the warehouse management system. For years the story was one of relentless hype. In 2026 the picture is more sober: the technology works and is scaling, but adoption is earlier and growth slower than the headlines suggest. The category is being reshaped by AI navigation, by robotics-as-a-service financing, by consolidation, and by a macro environment of tariffs and caution that has trimmed the forecasts.

This guide is written for supply chain, operations, and engineering leaders evaluating a warehouse robotics investment, and for the teams who must integrate robots with the warehouse management system and run them on the floor. It is deliberately vendor-neutral: we accept no payment from the vendors covered, and we name no single best system, because the right choice depends on your throughput, your building, your order profile, and whether you buy or subscribe. The pages that follow define the category, size the market honestly while flagging a tenfold conflation, profile the goods-to-person, storage, integrator, and mobile-industrial tiers, lay out an evaluation framework, and explain why integration and a clear-eyed reading of the deployment reality, not the robot specifications, decide the return.

~10x

the span between pure-AMR sizing and warehouse-automation-inclusive figures

No MQ

there is no Gartner quadrant; specialist firms hold the authoritative data

13% by 2030

the share of all warehouses expected to have even one fulfillment AMR

What the evidence says

- **The market span is enormous by definition.** Pure-AMR figures sit near \$3B to \$5B, but adding automated guided vehicles reaches roughly \$8B, and counting AMRs within total warehouse automation reaches tens of billions, so read every figure against its scope.
- **The authoritative data is not from Gartner.** There is no Gartner Magic Quadrant for warehouse robotics; the credible market data comes from specialist firms Interact Analysis and LogisticsIQ, with Gartner contributing hype cycles and predictions.
- **Hype and reality diverge sharply.** Gartner predicts half of new warehouses will be robot-centric by 2030, while Interact Analysis projects only about 13 percent of all warehouses will have even one fulfillment AMR by then.
- **Integration is the make-or-break variable.** The recurring reason deployments struggle is integration with the warehouse management system and the fragmentation of proprietary fleet software, not the robots themselves.

- **The forecasts have been trimmed.** Interact Analysis cut its AMR growth forecast in 2025, citing tariffs and economic uncertainty, a reminder that the category is scaling but not immune to the macro environment.

2. What warehouse robotics and AMRs are

Warehouse robotics automate the physical work of intralogistics, moving, picking, and storing goods, with software coordinating the fleet. The core approaches are:

- **Goods-to-person systems.** Robots bring shelves, racks, or totes to a stationary picker, eliminating the walking that dominates manual picking.
- **Collaborative picking robots.** Autonomous robots escort human pickers along optimized routes, boosting productivity without redesigning the building.
- **Autonomous transport and towing.** Mobile robots move pallets and carts and tow loads between zones, replacing manual and forklift movement.
- **Cube and shuttle storage.** Automated storage-and-retrieval systems compress inventory into dense grids and retrieve items on demand.
- **Fleet orchestration software.** The layer that coordinates robots, manages traffic, and integrates the fleet with the warehouse management system.

AMRs, AGVs, and the software layer

Two distinctions matter. First, an autonomous mobile robot navigates dynamically using onboard sensing, vision, and mapping, finding its own path and routing around obstacles, whereas an automated guided vehicle follows a fixed path defined by tape, wire, or laser targets and is less flexible. The industry is steadily shifting from guided vehicles to autonomous ones, though guided vehicles, especially automated forklifts, still generate a large share of revenue because of their higher unit price. Second, the robots are only half the system: the fleet-orchestration software that coordinates them and connects to the warehouse management system increasingly determines whether a deployment succeeds. As hardware commoditizes, differentiation is moving to navigation intelligence, orchestration, and integration speed.

Approach	What it automates	Best for
Goods-to-person	Bringing stock to the picker	High-volume picking
Collaborative AMR	Escorting human pickers	Flexible, brownfield
Autonomous transport	Moving pallets and carts	Material movement
Cube / shuttle AS/RS	Dense automated storage	Space-constrained sites

Warehouse robotics is distinct from the broader field of supply chain robotics, which includes manufacturing robots and last-mile delivery, and from the fixed conveyor and sortation automation that preceded it. This guide focuses on the mobile robots and automated storage that move and pick goods inside the four walls. Knowing your throughput, building, and order profile is the first scoping decision, because different approaches suit different operations.

3. The warehouse robotics market in 2026

Warehouse robotics has one of the widest sizing spreads in this series, and it comes entirely from where the boundary is drawn. Pure autonomous-mobile-robot figures sit near \$3B to \$5B; adding automated guided vehicles reaches roughly \$8B; counting AMRs within total warehouse automation reaches into the tens of billions. Treat the figures below as directional, and check what each one is counting.

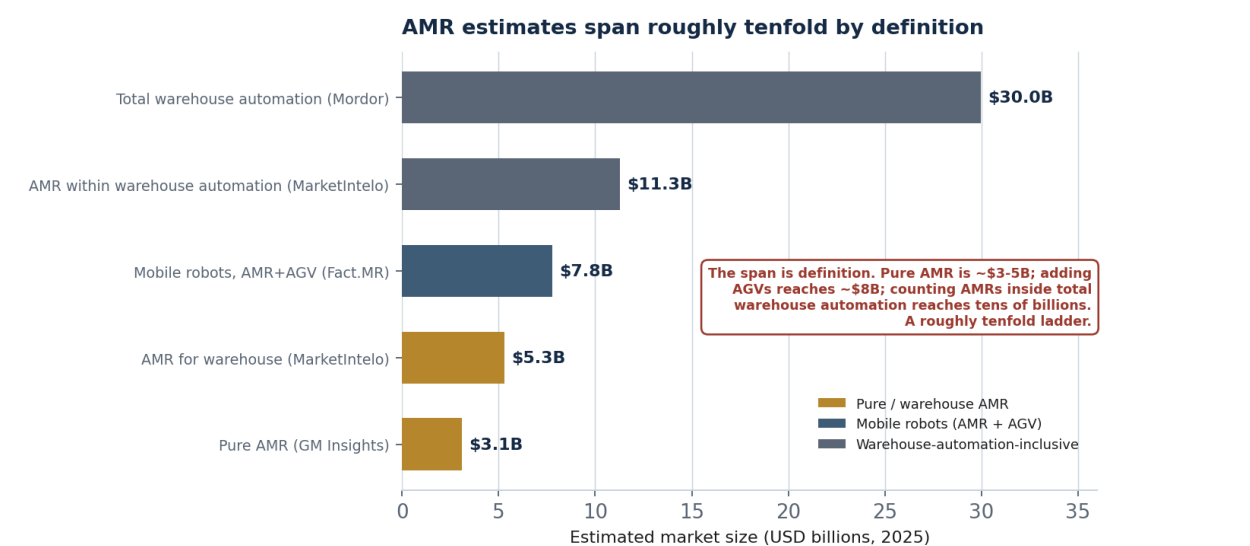
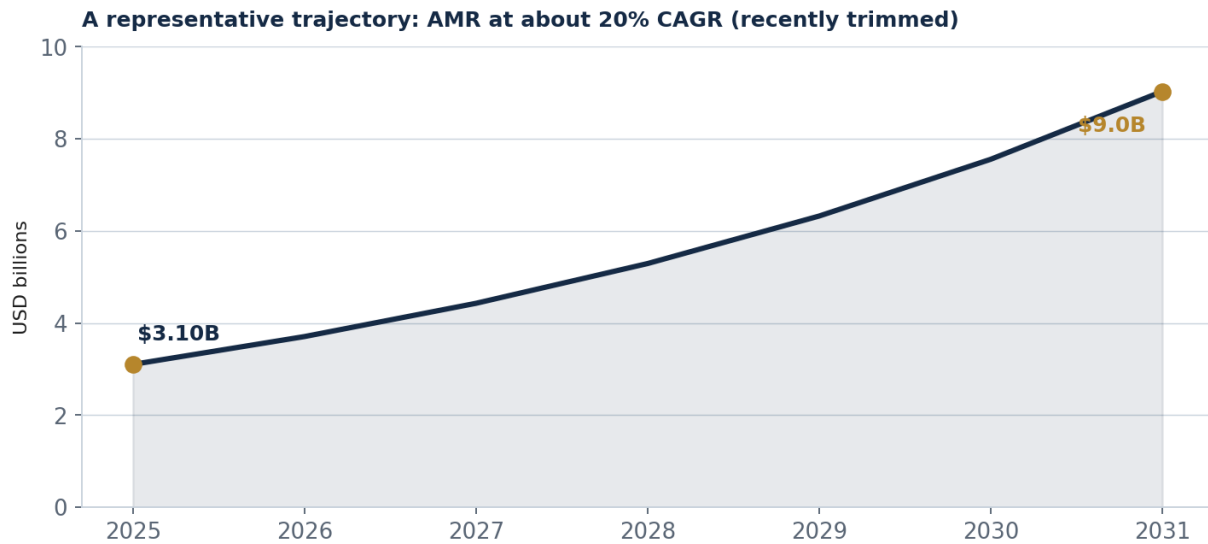


Figure 1. Published 2025 estimates by scope. Pure AMR sits near \$3B to \$5B; the figure climbs roughly tenfold as adjacent categories are folded in.

Source and scope	Size	Forecast	CAGR
Mordor (total warehouse automation)	\$29.98B (2025)	\$65.74B / 2031	~14%
MarketIntel (AMR in warehouse automation)	\$11.30B (2025)	\$72.4B / 2034	23.6%
Fact.MR (mobile robots, AMR+AGV)	\$7.80B (2025)	\$23.39B / 2036	10.5%
MarketIntel (AMR for warehouse)	\$5.30B (2025)	\$28.7B / 2034	20.4%
GM Insights (pure AMR)	\$3.10B (2025)	\$17.0B / 2035	19.5%



Source: representative pure-AMR trajectory at ~19.5% CAGR. Interact Analysis cut its AMR CAGR from 26% to 21% in 2025, citing tariffs and economic uncertainty.

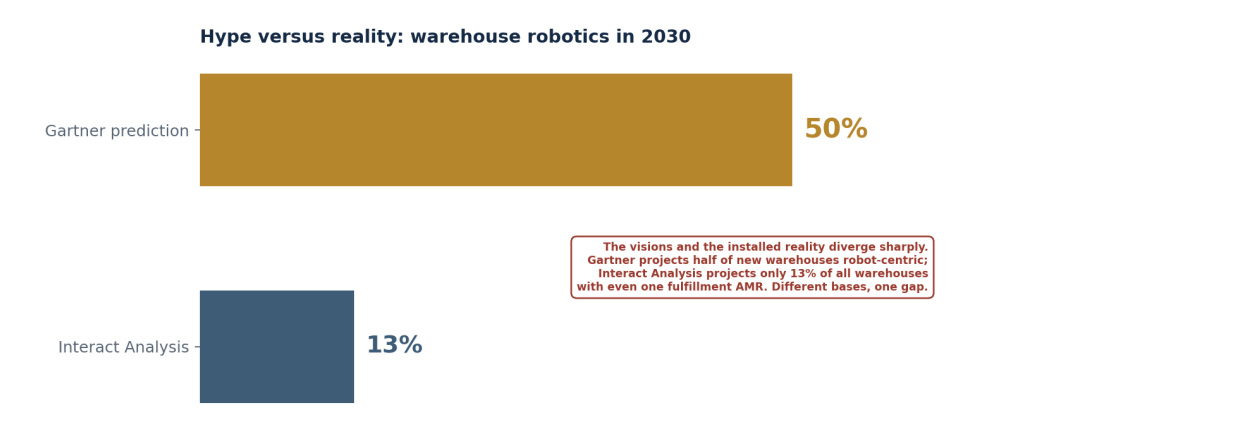
Figure 2. A representative trajectory for pure AMR at about 20 percent CAGR. Interact Analysis trimmed its AMR forecast in 2025 amid tariffs and caution.

Why the estimates diverge

The spread is scope. The narrowest figures count autonomous mobile robots alone; the next add automated guided vehicles; the broadest count AMRs as part of the entire warehouse-automation market, which includes conveyors, sortation, and cranes. Hardware accounts for roughly 55 to 67 percent of spend, mobile robots for about 41 percent of warehouse-automation spend, North America holds around 35 to 37 percent with Asia-Pacific and Europe both large, and logistics and warehousing is the dominant end-use. China's share is expected to fall as other regions accelerate. For planning, the pure-AMR figures of around \$3B to \$5B in 2025, growing near twenty percent, are the most defensible baseline for the mobile-robot category itself, provided automated guided vehicles and the wider automation market are counted separately.

Why hype and reality have parted ways

The most important thing to understand about this market in 2026 is the gap between vision and installed reality, shown in Figure 3. Gartner predicts that by 2030 half of new warehouses in developed markets will be robot-centric and human-optional. Interact Analysis, the specialist that has tracked this market for eight years, projects that by the same year only about 13 percent of all warehouses will have deployed even one fulfillment AMR. Both can be true, they use different denominators, but together they capture the essential tension: the technology is proven and scaling, yet penetration remains low, and in 2025 Interact cut its growth forecast outright, citing tariffs and economic uncertainty. Buyers should invest on the strength of their own business case, not the hype.



Sources: Gartner (50% of new warehouses robot-centric and human-optional by 2030) and Interact Analysis (13% of all warehouses with at least one fulfillment AMR by 2030). The two use different denominators; shown to contrast vision and installed reality.

Figure 3. Vision versus installed reality. The two figures use different bases but together show a category that is proven yet still early in adoption.

4. The vendor landscape

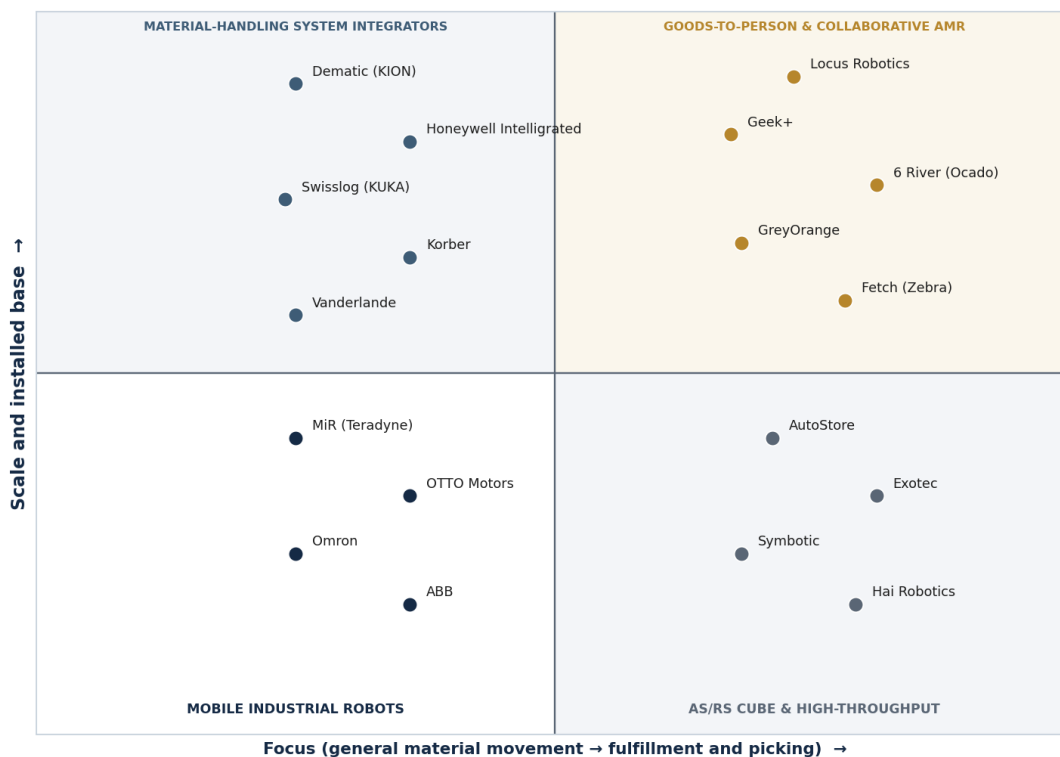
The warehouse robotics market spans goods-to-person and collaborative AMR specialists, cube and high-throughput storage vendors, material-handling system integrators, and mobile-industrial-robot makers. We group vendors into four tiers by what they do best, not by size. The market is fragmented, with more than a hundred vendors and no single player holding a dominant share, and consolidation is under way.

What the analysts say, and who actually covers this

The analyst picture here is distinctive: the authoritative source is not Gartner. The essentials:

- **There is no Gartner Magic Quadrant for warehouse robotics.** Gartner covers the space through hype cycles and predictions rather than a ranked vendor grid, so there is no quadrant to lean on.
- **Specialist firms hold the market data.** Interact Analysis and LogisticsIQ are the authoritative sources for market sizing and vendor share, with Interact tracking the sector for eight years and publishing frequent, rigorous revisions.
- **Fragmentation and share matter.** The top vendors together hold only a little over half the market, and no single player exceeds roughly a fifth, so references and pilots matter more than any single ranking.

Warehouse robotics and AMR landscape, 2026



There is no Gartner Magic Quadrant for warehouse robotics; the authoritative market data comes from specialist firms Interact Analysis and LogisticsIQ, plus Gartner Hype Cycles. SCR interpretation, not analyst coordinates.

Figure 4. Supply Chain Research's directional map. There is no Gartner quadrant for warehouse robotics; these positions are our interpretation, not analyst coordinates.

Goods-to-person and collaborative AMR

These vendors lead in e-commerce fulfillment. Locus Robotics, valued near \$2 billion after a large 2025 funding round, pioneered the collaborative picking model, has crossed three billion picks, and pairs its robots with the LocusONE platform and an analytics layer, all offered as a service. Geek+ has built the largest goods-to-person installed base globally, with tens of thousands of robots across dozens of countries and a vision-based navigation approach that underprices lidar rivals. 6 River Systems, now part of Ocado, offers its Chuck collaborative robot, and Fetch Robotics, now part of Zebra, and GreyOrange round out the group. Strengths: fast deployment, proven fulfillment productivity, and service-based commercial models. Limitations: proprietary fleet software creates lock-in, and Chinese competition is compressing margins.

Cube and high-throughput storage

These vendors compress storage and drive high throughput. AutoStore, a public company, pioneered the cube storage-and-retrieval grid that packs inventory densely, and Exotec's Skypod system combines dense storage with mobile robots. Symbotic, backed by major retail partners, automates large-scale case handling at high throughput, and Hai Robotics brings autonomous case-handling robots. Strengths: space efficiency and throughput at scale. Limitations: they are larger fixed investments with longer implementations, better suited to committed, high-volume operations.

Integrators and mobile industrial robots

Two further groups complete the picture. Material-handling system integrators, Dematic, part of KION, Honeywell Intelligrated, Swisslog, part of KUKA, Korber, and Vanderlande, design and integrate complete automated warehouses combining robots, conveyors, and software. And mobile-industrial-robot makers, MiR, part of Teradyne, OTTO Motors, Omron, and ABB, focus on autonomous transport across manufacturing and logistics. Strengths: end-to-end system integration and broad automation portfolios respectively. Limitations: the integrators are heavier engagements, and the mobile-industrial makers are transport-focused rather than fulfillment-specialized.

Vendor summary

Vendor	Tier	Best fit	Notes
Locus Robotics	Collaborative AMR	E-commerce picking	~\$2B valuation; 3B+ picks; RaaS
Geek+	Goods-to-person AMR	Large-scale G2P fulfillment	Largest G2P installed base
6 River Systems (Ocado)	Collaborative AMR	3PL and retail fulfillment	Chuck platform; Ocado-owned
AutoStore / Exotec	Cube / shuttle storage	Dense storage, space-constrained	High density; larger investment
Symbotic	High-throughput case handling	Large-scale retail DCs	Public; major retail backing
Dematic / Honeywell / Swisslog / Korber	System integrator	Complete automated warehouses	End-to-end integration
MiR (Teradyne) / OTTO Motors	Mobile industrial robots	Autonomous transport	Manufacturing and logistics
Fetch (Zebra) / GreyOrange / Hai	AMR specialists	Picking, transport, case handling	Varied niches and geographies

Positions and notes are Supply Chain Research's interpretation from public information and specialist research from Interact Analysis and LogisticsIQ, current to mid-2026. There is no Gartner Magic Quadrant for warehouse robotics. Ownership and scope change quickly, including Zebra's ownership of Fetch and Ocado's ownership of 6 River Systems; verify current details directly with each vendor.

5. How to evaluate a warehouse robotics solution

The differentiators in warehouse robotics are fit to your operation, integration, and the commercial model, more than the robot specifications. We use five dimensions.

The five evaluation dimensions

- 1. Operational fit.** Does the approach, goods-to-person, collaborative, transport, or storage, match your throughput, order profile, and building? A mismatch here cannot be fixed later.
- 2. Integration with the WMS.** How cleanly does the fleet software connect to your warehouse management and ERP systems, since integration is the most common source of difficulty and delay?
- 3. Fleet orchestration and interoperability.** How well does the software coordinate large, mixed fleets, and can it work alongside other vendors' robots, given the lack of universal standards?
- 4. Commercial model.** Is a capital purchase or a robotics-as-a-service subscription the better fit for your capital position, volume seasonality, and risk appetite?
- 5. Scalability, AI, and viability.** Assess how the system scales from a pilot to hundreds of robots, its AI navigation and fleet intelligence, and the vendor's stability in a consolidating market.

Making the decision

Match the system to your operation and constraints. High-volume e-commerce picking rewards goods-to-person and collaborative AMR specialists such as Locus and Geek+. Space-constrained, high-throughput operations reward cube storage and case handling such as AutoStore, Exotec, and Symbotic. Companies wanting a complete automated warehouse reward the system integrators, and manufacturing transport rewards the mobile-industrial makers. Then validate fit and integration with a pilot in your own building.

A selection process that works

- 6.** Define your throughput, order profile, and building constraints, and use them to choose the approach.
- 7.** Run a pilot in your own operation, not a vendor demonstration facility.
- 8.** Test WMS and ERP integration early, since it is the most common cause of delay.
- 9.** Model both capital purchase and robotics-as-a-service against your finances and seasonality.
- 10.** Assess fleet scaling, AI navigation, and references at operations of your size.

6. Cost and pricing

Warehouse robotics can be bought or subscribed to, and the commercial model matters as much as the price. The models you will encounter:

Model	Typical basis	Notes
Capital purchase	Per robot or system	Large upfront investment
Robotics-as-a-service	Per robot per month	Roughly \$1,500-\$3,500 per robot
Pay-per-pick	Per unit handled	Provider retains the equipment
Integrated system	Whole-warehouse project	Integrator-designed and built
Integration and support	Project and ongoing	WMS integration, maintenance

What drives the number

The number of robots, the approach, and the commercial model are the main cost drivers, and integration with the warehouse management system is a significant additional cost, often requiring three to six months of technical work. A capital purchase is a large upfront investment; robotics-as-a-service, at roughly fifteen hundred to thirty-five hundred dollars per robot per month, removes the upfront capital and enables scaling for peak seasons, and pay-per-pick models can reduce project capital by sixty to eighty percent by leaving ownership with the provider. Robotics-as-a-service can cut total cost of ownership by up to thirty percent versus outright purchase, with fleets reaching payback in as little as twelve months. A common mistake is choosing the wrong commercial model for the operation, buying capital-heavy systems for seasonal volume, or subscribing indefinitely to what a purchase would amortize. Model the full cost, including integration and the commercial structure, against the labor and throughput benefits.

Robotics pricing is gated behind a sales and design process and depends heavily on approach, volume, and building, so published figures should be treated as starting points. Build a pilot and a total-cost comparison of purchase versus service into the buying process to validate both cost and the productivity benefits the vendor projects.

7. Implementation: where programs succeed or fail

Warehouse robotics programs fail in predictable ways, and the failures are rarely about the robots. They are about integration, fit, and organizational readiness. The recurring causes:

- **Integration with the WMS is underestimated.** Connecting robots to the warehouse management and ERP systems commonly takes three to six months of technical work, and if it is underestimated the deployment stalls before it delivers value.
- **Multi-vendor fleets do not interoperate.** Because proprietary navigation and fleet software rarely share traffic management, mixing vendors adds cost and complexity, and the emerging interoperability standards are not yet universal.
- **The approach does not fit the operation.** A system chosen for the wrong throughput, order profile, or building underperforms, because fit is decided before deployment, not tuned afterward.
- **Leadership and vision are lacking.** Independent analysis finds that a significant share of automation projects fail because of a lack of cohesive vision and limited leadership understanding of the technology, not the technology itself.

Integration WMS integration is the most common source of delay and difficulty	Interoperability proprietary fleet software makes mixing vendors costly	Vision leadership understanding and a clear plan are decisive
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Three principles that separate success from failure

- **Treat WMS integration as the critical path.** Plan and resource the integration with the warehouse management system first, because it is the most common cause of delay and the robots deliver nothing without it.
- **Choose the approach for the operation.** Match the system to your throughput, order profile, and building before selecting a vendor, because fit is decided upfront and cannot be tuned away later.
- **Lead with vision, not just hardware.** Secure leadership understanding and a clear operational plan, because automation projects fail on cohesive vision more often than on technology.

A phased rollout

Sequence the program to retire risk early. Begin with a pilot in one area or building, proving the fit, the integration with the warehouse management system, and the productivity in your own operation. Then scale the fleet within that site, extend to more zones and buildings, and add AI-driven fleet intelligence as volumes justify it. Treating these as sequential stages, rather than a single large deployment, is what separates a smooth rollout from a stalled and costly one.

8. Trends shaping 2026

AI navigation and fleet intelligence

The dominant trend is AI applied to navigation and fleet coordination: vision-based and hybrid sensor navigation that needs no fixed markers, and fleet-intelligence software that optimizes routing and throughput in real time across large mixed fleets. As hardware commoditizes, this software intelligence is where vendors increasingly differentiate, and it is the clearest near-term source of productivity gains.

Robotics-as-a-service

Robotics-as-a-service is reshaping how robots are bought, removing the upfront capital and letting operators scale fleets for peak seasons and pay as they go. By making automation accessible without a large capital outlay, it is extending adoption beyond the largest operators to mid-market warehouses, and it is shifting vendor revenue toward recurring software and services.

Consolidation and Chinese competition

The market is consolidating, with automation majors acquiring robotics specialists, Zebra's ownership of Fetch and Ocado's of 6 River Systems among them, and more mergers expected. At the same time, competitive Chinese manufacturers are compressing hardware margins, accelerating the industry-wide shift toward software and services-led revenue. Buyers should weigh the stability of larger owners against the innovation of independents.

Mobile manipulation and the humanoid debate

A newer frontier is mobile manipulation, combining a mobile base with a robotic arm to pick, place, and unload, addressing the physically demanding tasks that have resisted automation. Some vendors position this as a practical alternative to the much-discussed humanoid robots, and if it matures it could open a structurally new application segment and expand the addressable market.

Tariffs, caution, and agentic frontiers

The macro environment has intervened. Tariffs and economic uncertainty led Interact Analysis to cut its growth forecast in 2025, as companies delayed large capital investments, a reminder that this capital-intensive category is sensitive to the cycle. As across supply chain software, agentic AI is an emerging frontier for fleet decisioning, though it is early and demonstrated capability should be weighed over roadmap promises.

9. Segment-specific guidance

The right approach depends on your operation and constraints. The table summarizes where each segment usually starts; the prose adds the nuance.

Operation profile	What matters most	Where to start
High-volume e-commerce	Picking productivity, flexibility	Locus, Geek+, 6 River Systems
Space-constrained DC	Storage density	AutoStore, Exotec, Hai Robotics
Large-scale retail DC	High-throughput case handling	Symbotic, integrators
Complete greenfield build	End-to-end integration	Dematic, Honeywell, Swisslog, Korber
Manufacturing / transport	Autonomous material movement	MiR, OTTO Motors, Omron

High-volume e-commerce operations reward the picking productivity and flexibility of the goods-to-person and collaborative specialists. **Space-constrained centers** reward the storage density of cube and shuttle systems. **Large-scale retail DCs** reward high-throughput case handling. **Greenfield builds** reward the system integrators who deliver a complete automated warehouse, and **manufacturing operations** reward the mobile-industrial makers for autonomous transport. The unifying rule is to match the approach to your throughput, order profile, and building first, then choose the vendor.

10. ROI and the business case

The business case for warehouse robotics rests chiefly on labor, and it has strengthened as wages have risen. The levers are labor productivity, throughput, round-the-clock operation, safety, and resilience against a chronic labor shortage. The discipline is modeling the case on your own labor cost, volume, and seasonality, and treating vendor productivity claims as a ceiling.

Labor robots replace the walking and manual handling that dominate picking	Throughput automation lifts and sustains throughput, including at peak	Safety less manual handling reduces injuries and their associated cost
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Where the value comes from

Most of the return comes from labor. Warehouse wages rose sharply over recent years, and worker turnover in high-throughput fulfillment frequently exceeds seventy to one hundred percent annually, so automation that reduces the headcount and the recruitment burden has a large and growing payoff. Vendor and industry figures suggest a fleet of goods-to-person robots with a handful of supervising technicians can replicate the throughput of dozens of peak-season associates, and collaborative picking has been reported to double or triple productivity while reducing injuries, but these are vendor and industry-sourced and should be treated as a ceiling. Beyond labor, automation sustains throughput around the clock and improves safety, reducing the injuries associated with manual handling and forklifts. Robotics-as-a-service can bring payback in as little as twelve months and reduce total cost of ownership by up to thirty percent. The business case is strongest where labor is expensive, scarce, and high-turnover, but the value should be modeled on your own wage rates, volumes, and seasonality, with vendor figures used only to size the opportunity.

11. Frequently asked questions

What are warehouse robotics and AMRs?

Mobile robots and automated systems that move, pick, and store goods inside distribution centers, coordinated by fleet-orchestration software. The main approaches are goods-to-person systems, collaborative picking robots, autonomous transport and towing, mobile sortation, and cube or shuttle storage-and-retrieval systems.

What is the difference between an AMR and an AGV?

An autonomous mobile robot navigates dynamically using onboard sensing, vision, and mapping, finding its own path and routing around obstacles. An automated guided vehicle follows a fixed path defined by tape, wire, or laser targets and is less flexible. The industry is shifting from guided vehicles to autonomous ones, though automated forklifts still generate significant revenue.

Is there a Gartner Magic Quadrant for warehouse robotics?

No. Gartner covers the space through hype cycles and predictions rather than a ranked vendor quadrant. The authoritative market data comes from specialist research firms, principally Interact Analysis and LogisticsIQ, which track sizing, shipments, and vendor share in detail.

Who are the leading vendors?

It depends on the approach. Goods-to-person and collaborative AMR specialists include Locus Robotics, Geek+, 6 River Systems, and Fetch; cube and high-throughput storage includes AutoStore, Exotec, and Symbotic; system integrators include Dematic, Honeywell Intelligrated, Swisslog, and Korber; and mobile-industrial makers include MiR and OTTO Motors.

How big is the market?

It depends entirely on scope. Pure autonomous-mobile-robot figures sit near \$3B to \$5B in 2025; adding automated guided vehicles reaches roughly \$8B; and counting AMRs within total warehouse automation reaches into the tens of billions, a roughly tenfold span. The pure-AMR figures are the most defensible baseline for the mobile-robot category.

How fast is the market really growing?

Around twenty percent a year for pure AMR, but the forecasts have been trimmed. Interact Analysis cut its AMR growth forecast in 2025, from twenty-six to twenty-one percent, citing tariffs and economic uncertainty as companies delayed large capital investments. The category is scaling but not immune to the macro cycle.

Isn't the hype ahead of reality?

To a degree, yes. Gartner predicts half of new warehouses will be robot-centric by 2030, while Interact Analysis projects only about 13 percent of all warehouses will have even one fulfillment AMR by then. Both can be true on different bases, but together they show a proven technology that remains early in adoption. Invest on your own business case.

Should I buy the robots or use robotics-as-a-service?

It depends on your finances and volume. A capital purchase suits stable, high-volume operations that can amortize the investment; robotics-as-a-service, at roughly fifteen hundred to thirty-five hundred dollars per robot per month, removes the upfront capital and enables scaling for seasonal peaks. Pay-per-pick can cut project capital by sixty to eighty percent.

What is the most common reason these programs fail?

Underestimated integration with the warehouse management system, multi-vendor fleets that do not interoperate, an approach that does not fit the operation, and a lack of leadership vision. Almost none of the common failures are about the robots. Treating WMS integration as the critical path and choosing the approach for the operation are the most important steps.

12. Recommendations

A practical path for buyers, drawn from the analysis above:

- 11. Size the market by scope, not the headline.** Anchor on pure-AMR figures near \$3B to \$5B, and disregard warehouse-automation-inclusive numbers when assessing the mobile-robot category itself.
- 12. Use specialist research, not a quadrant.** Because there is no Gartner Magic Quadrant, lean on Interact Analysis and LogisticsIQ for market data, plus references and pilots at your scale.
- 13. Separate hype from your business case.** Invest on your own labor, throughput, and payback numbers, not on bold penetration predictions, because adoption is still early even as the technology is proven.
- 14. Make WMS integration the critical path.** Plan and resource the integration first, because it is the most common cause of delay and the robots deliver nothing until it is done.
- 15. Choose the commercial model deliberately.** Compare capital purchase, robotics-as-a-service, and pay-per-pick against your finances and seasonality, because the model matters as much as the price.
- 16. Treat ROI claims as a ceiling.** Model labor and throughput benefits on your own wages, volumes, and turnover, and weigh AI and mobile-manipulation claims by demonstrated capability rather than roadmap.

13. Methodology and caveats

- This guide synthesizes public market-research estimates, specialist research from Interact Analysis and LogisticsIQ, Gartner predictions and hype cycles, independent analysis from McKinsey, vendor disclosures, and trade reporting, current to mid-2026. Supply Chain Research is independent and accepts no payment from the vendors covered.
- Market-size figures span roughly tenfold by scope, between pure AMR (around \$3B to \$5B), mobile robots including automated guided vehicles (around \$8B), AMRs within warehouse automation (into the low tens of billions), and total warehouse automation (around \$30B and up). We present a range and treat the pure-AMR figures as the most defensible baseline. Several sources are SEO-style market-research firms and are directional only; Interact Analysis is the credible specialist anchor.
- There is no Gartner Magic Quadrant for warehouse robotics; the authoritative market data comes from specialist firms. The landscape map in Figure 4 is our directional interpretation, not analyst coordinates.
- The hype-versus-reality figures in Figure 3 use different denominators: Gartner's is the share of new warehouses that will be robot-centric by 2030, and Interact Analysis's is the share of all warehouses with at least one fulfillment AMR by 2030. They are presented to contrast vision with installed reality, not as like-for-like. Productivity and ROI figures are vendor or industry-sourced and treated as a ceiling.
- Vendor ownership and scope change quickly, including Zebra's ownership of Fetch and Ocado's ownership of 6 River Systems. Validate current details directly with vendors before any purchasing decision.

14. Sources

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- [9] Open Sky Group (2026). [Warehouse automation statistics, citing Gartner, Interact Analysis, McKinsey, and MHI.](#)

Additional figures drawn from: Grand View Research and Business Research Insights on AMR sizing; Gartner predictions (50% of new warehouses robot-centric by 2030) and Interact Analysis (13% of warehouses with at least one fulfillment AMR by 2030; installed base exceeding 4.2 million units by 2030); McKinsey on automation-project failure and pay-per-pick economics; and vendor disclosures from Locus Robotics, Geek+, AutoStore, Symbolic, and MiR. Productivity and ROI claims are vendor or industry-sourced unless otherwise noted, and there is no Gartner Magic Quadrant for warehouse robotics.

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